2026 Personal Wealth Conference Agenda

Wednesday, April 15

Evening Client Reception: Cocktails and Hors d'oeuvres	5:30 - 7:30 PM

Thursday, April 16

Registration and Light Breakfast	8:00 – 8:30 AM
Opening Remarks **Robin Winningham**, *Chief Operating Officer, Scholar Financial Advising*	8:30 – 8:45 AM
Building a Multi-Generational Portfolio **Stephan Shipe, Ph.D., CFA, CFP®**, *Financial Advisor & CEO, Scholar Financial Advising*	8:45 – 9:45 AM
A New Signal for Market Valuations **Deon Strickland, Ph.D.**, *Financial Advisor and Economist, Scholar Financial Advising*	9:45 – 10:45 AM
Break	10:45 – 11:00 AM
Estate Planning Today **J. Aaron Bennett, J.D.**, *Estate Attorney, Carruthers & Roth P.A.*	11:00 AM – 12:00 PM
Networking Lunch	12:00 – 1:00 PM
Ask an Advisor Panel **Stephan Shipe, Ph.D., CFA, CFP®, Derek Cheshire, CFP®, EA, Deon Strickland, Ph.D.**	1:00 – 1:45 PM
Closing Remarks **Robin Winningham**, *Chief Operating Officer, Scholar Financial Advising*	1:45 – 2:00 PM
Optional Group Activities	2:00 – 5:00 PM

Friday, April 17

Breakfast & Opening Remarks	8:00 – 8:45 AM
Spending with Intention **Derek Cheshire, CFP®, EA**, *Associate Financial Advisor, Scholar Financial Advising*	8:45 – 9:45 AM
The Evolution of Modern Markets **Marty Malloy**, *Professor of Finance, Wake Forest University School of Business*	9:45 – 10:45 AM
Break	10:45 – 11:00 AM
Investing in Private Businesses in an Era of Mass Retirement **Brandon Mendez, Ph.D.**, *Clinical Assistant Professor of Corporate Finance and Investments, University of SC*	11:00 AM – 12:00 PM
Networking Lunch	12:00 – 1:00 PM
Panel Discussion **Deon Strickland, Ph.D.**, *Financial Advisor, Scholar Financial Advising*	1:00 – 1:30 PM
On the Horizon: What We're Watching for Next Year **Stephan Shipe, Ph.D., CFA, CFP®**, *Financial Advisor & CEO, Scholar Financial Advising*	1:30 – 2:00 PM